Project Report Tamplate

INTRODUCTION

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don’t know where you should start on your learning journey? If you’veansweredyestoanyofthesequestions,thenyou’re in the right place. This module is for you. Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we’ll take you through these features and answer the question, “What is Salesforce, anyway?”

1.1 Overview

A brife description about your project

Develop an App for the Property Management where Buyer can order his Requirements andget the Appropriate Details of the Property. According to his interest just provide him with some discounts upto what extent the loan available for so just calculate how much loan Amount user cangetit.ProvidetheSecurityfor two different profiles like for marketing and sales team. Then Finally Create the reports and dashboard so there will be clear view just get the reports on the count of loan passed getting the property purchased close the deal

Now we are going to prepare PROPERTY MANAGMENT APPLICATION.

1.2 Purpose

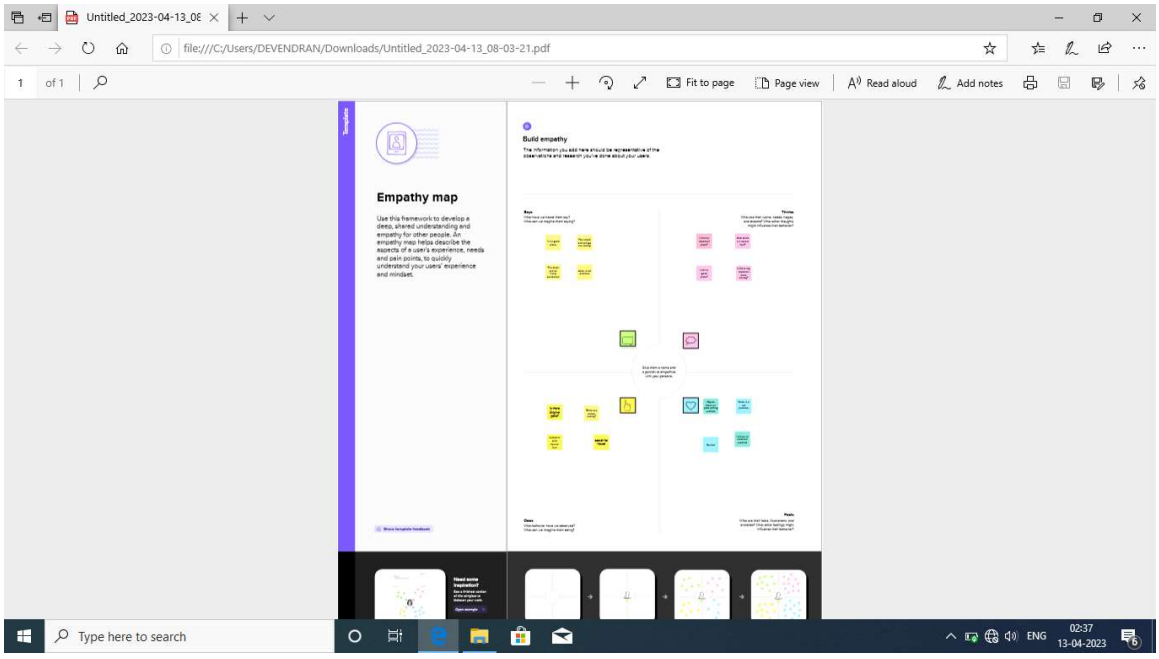
The use of this project. What can be achieved using this.

The usee of this project to property management . We can achieved too create a assist owners in creating budgets, advertis erental properties,qualify tenants,and collect rent.

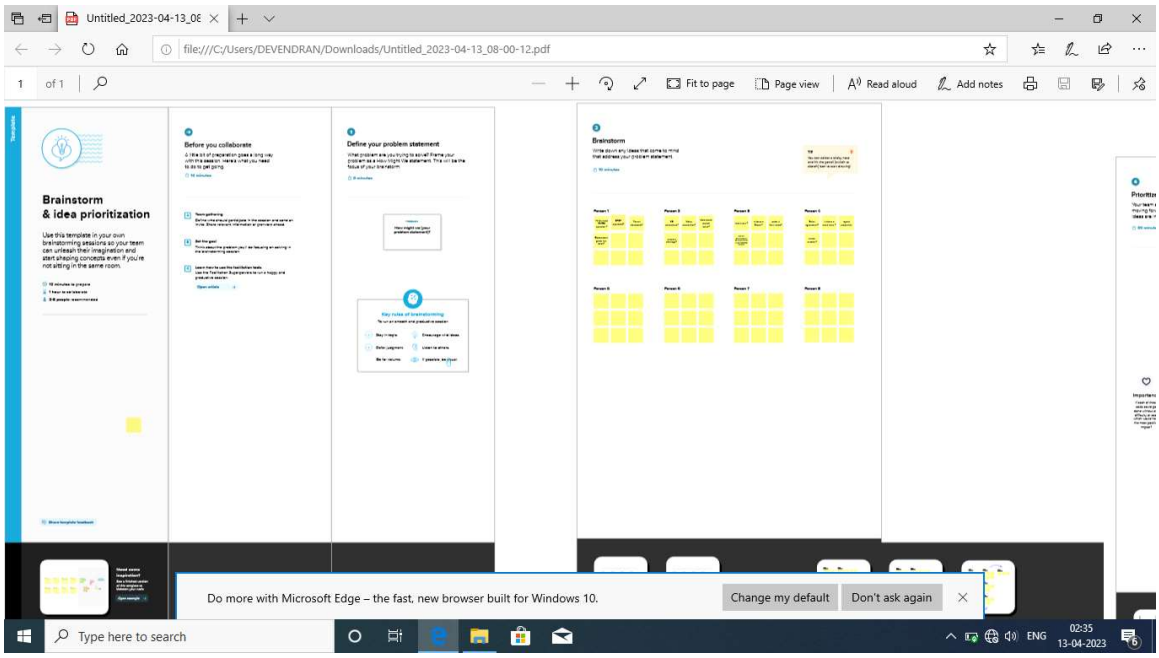
Poblem Definition&Desingn Thinking

The suprvision of residential, commercial,and industrial properties,including apartments,datached houses,and shopping centres... Design thinking include empathy, collabration,creativity and exploration

2.1 Empathy map



2.2 Ideation&Brainstorming map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Fit to page
Page view
Read aloud
Add notes
Brainstorm
& idea prioritization
Before you collaborate
Define your problem statement
Brainstorm
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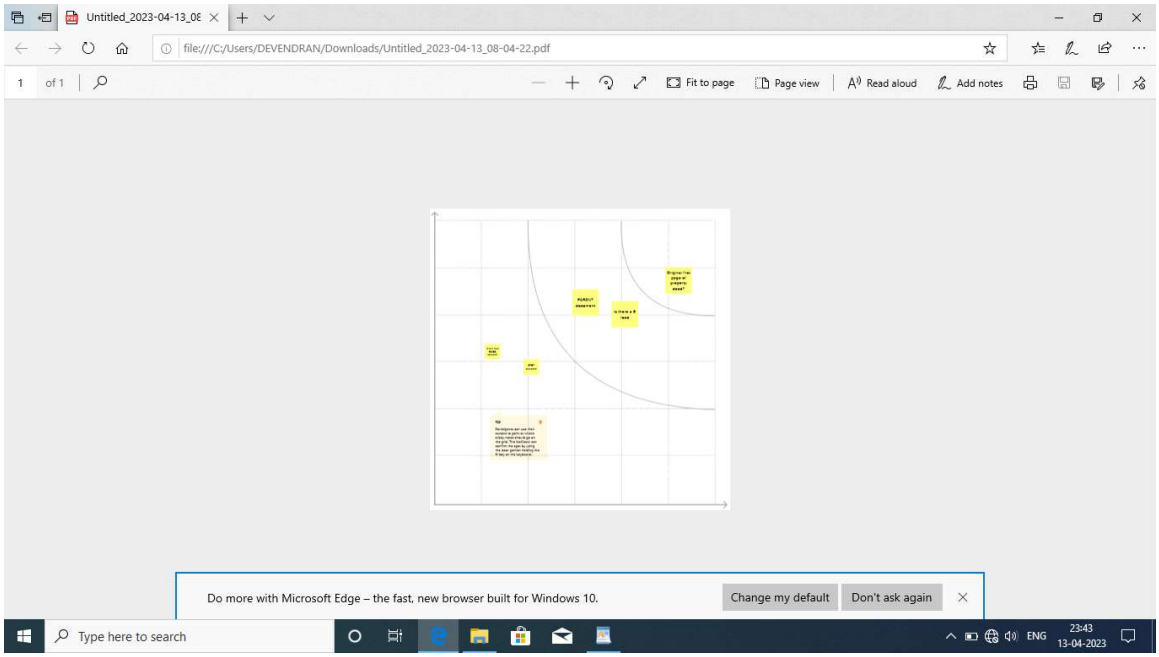
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Add notes
Do more with Microsoft Edge – the fast, new browser built for Windows 10.
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Result

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- Lead

</td><td>

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<tr><td>state</td><td>picklist</td></tr>
<tr><td>city</td><td>piclist</td></tr>
<tr><td>Email</td><td>email</td></tr>
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- Buy

</td><td>

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<tr><td>city</td><td>piclist</td></tr>
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- Rent

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<table>
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- Loan

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<table>
<tr><td>Loan id</td><td>auto number</td></tr>
<tr><td>Interrest rate</td><td>currency</td></tr>
<tr><td>Term</td><td>number</td></tr>
<tr><td>annual loan</td><td>number</td></tr>
<tr><td>total loan instalment</td><td>number</td></tr>
<tr><td>Loan repayment</td><td>number</td></tr>
<tr><td>loan amount</td><td>formula</td></tr>
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</table>

3.2 Activity & Screenshot

Attach the screenshoot of your project activity along with the

Discription

Creating Developer Account Creating a developer org in salesforce. 1. Go to developers.salesforce.com/

2. Click on sign up.

3. On the sign up form, enter the following details :

a. First name & Last name

b. Email

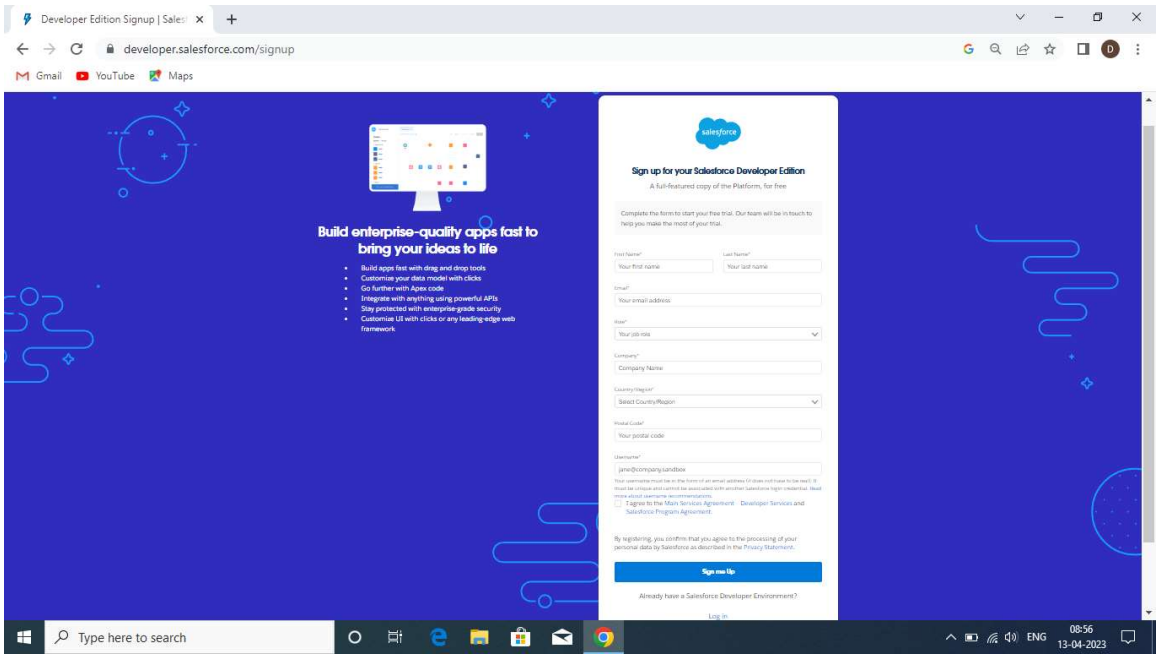
c. Role : Developer

d. Company : College Name

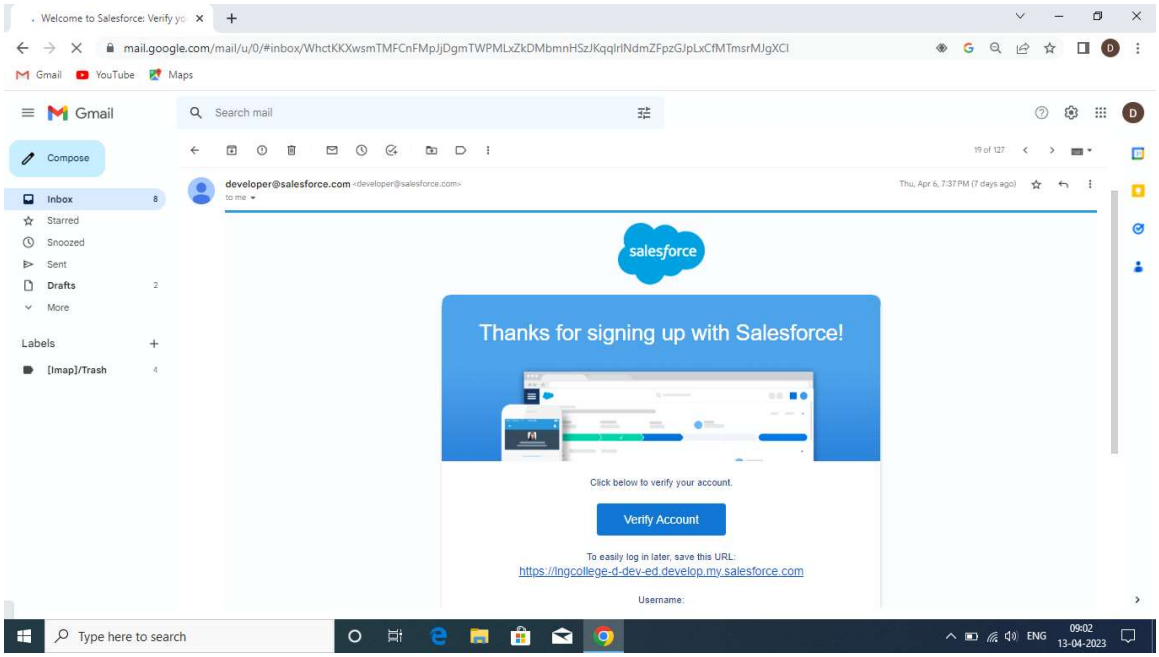
e. County : Indi

a f. Postal Code : pin code

g. Username : should be a combination of your name and company This need not be an actual email id, you can give anything in the format : username@organization.com Click on sign up after filling these.



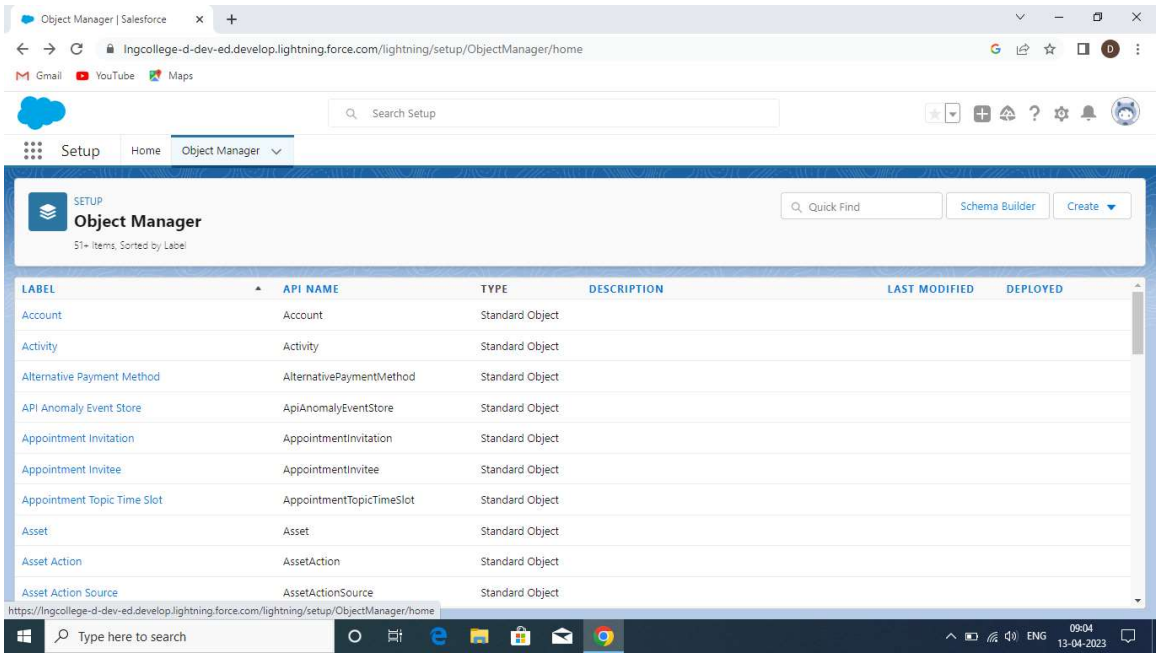
Account activation



login to salesforce account

- Object

From the setup page and click on object managerand go to click on create and click on custom object oopan the page enter the label name,pural label name, ,click on allow reports, allow search and save

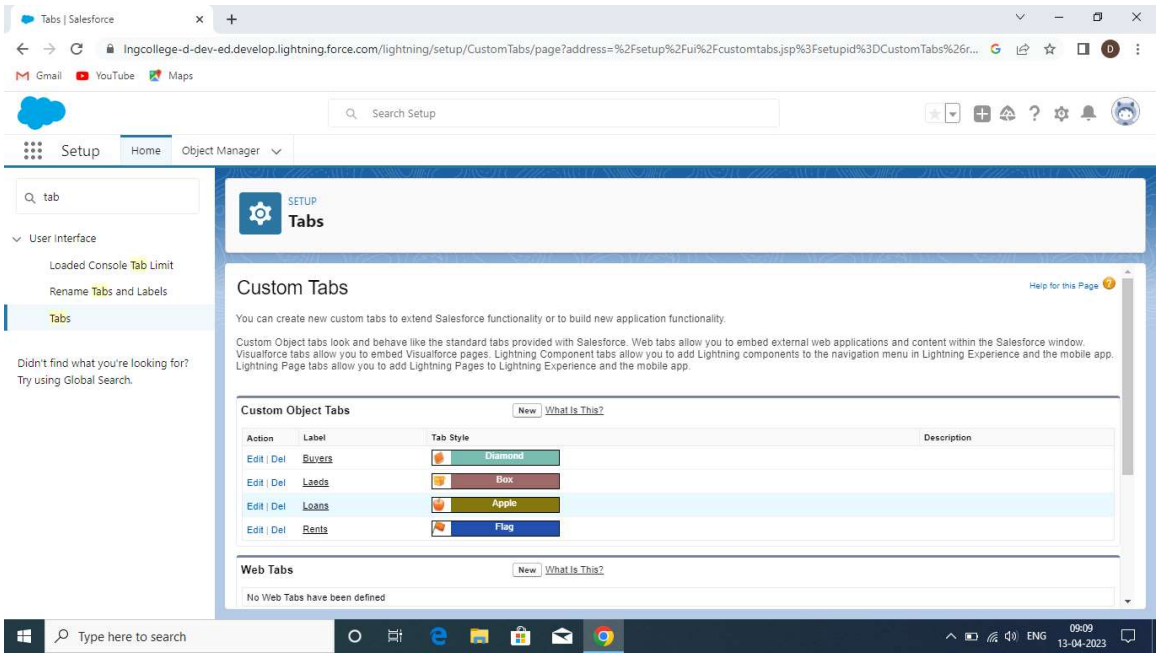


1.lead 2.buy 3.Rent 4.loan was created.

- Tabs

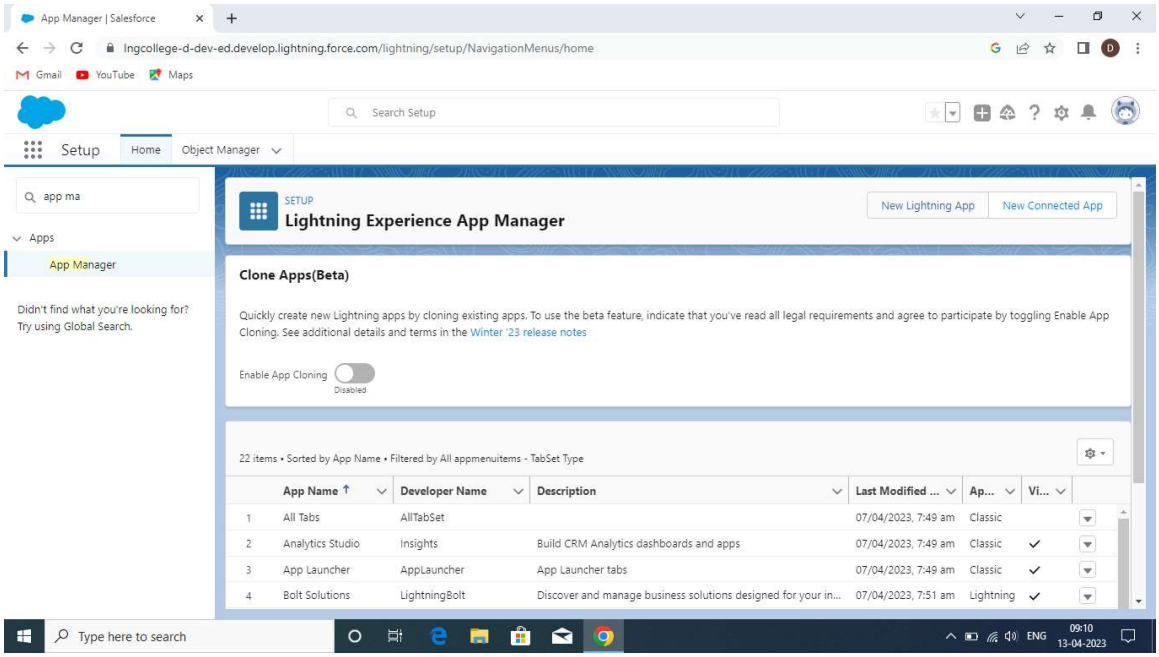
To create a Tab

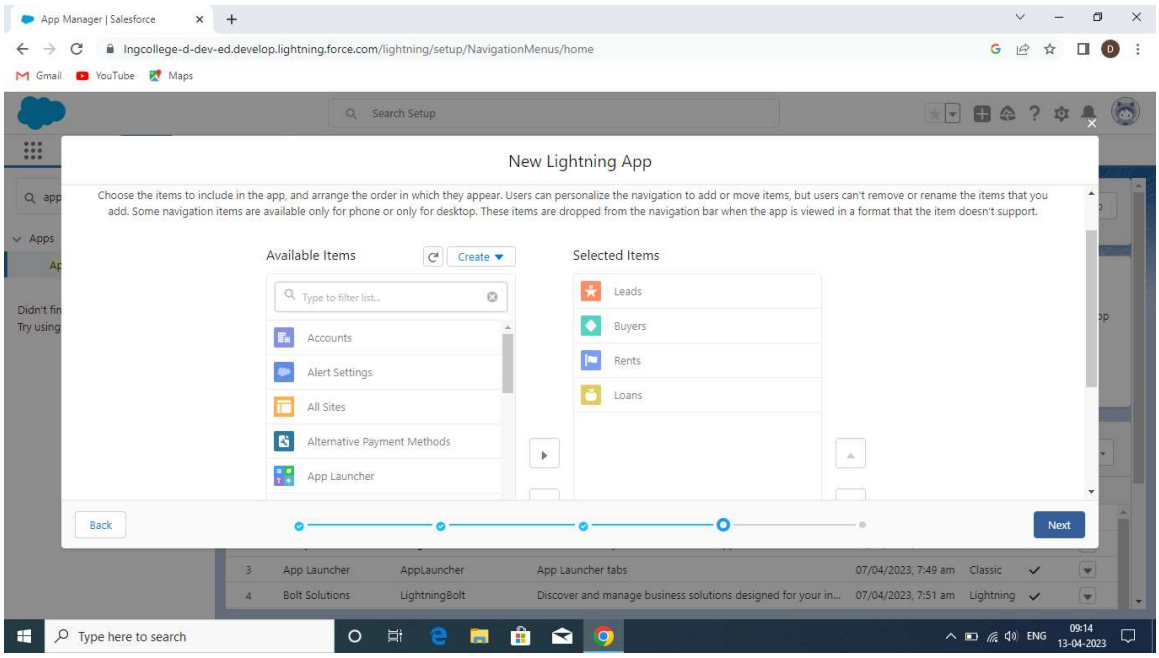
Go to setup page and type tabs in quick find bar and click on tabs custom object tab on right side click on new and select the name for example lead and select a tab syste and next and next and save



1.lead 2.buy 3.Rent 4.loan was created.

- The Lightning App




App Manager | Salesforce
lngcollege-d-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Gmail
YouTube
Maps
Search Setup
New Lightning App
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Accounts
Alert Settings
All Sites
Alternative Payment Methods
App Launcher
Selected Items
Leads
Buyers
Rents
Loans
Back
Next
3 App Launcher AppLauncher App Launcher tabs 07/04/2023, 7:49 am Classic
4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your in... 07/04/2023, 7:51 am Lightning
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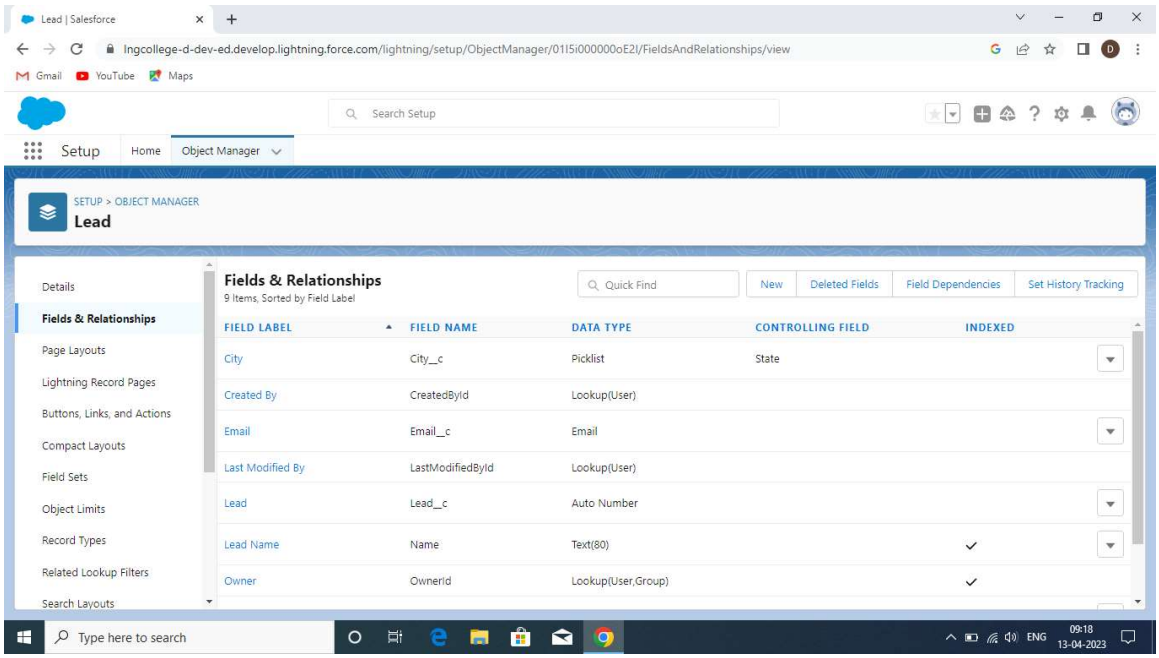
- Fields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Gmail
YouTube
Maps
Search Setup
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Object Manager
SETUP > OBJECT MANAGER
Lead
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Fields & Relationships
9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
City City__c Picklist State
Created By CreatedById Lookup(User)
Email Email__c Email
Last Modified By LastModifiedById Lookup(User)
Lead Lead__c Auto Number
Lead Name Name Text(80)
Owner OwnerId Lookup(User,Group)
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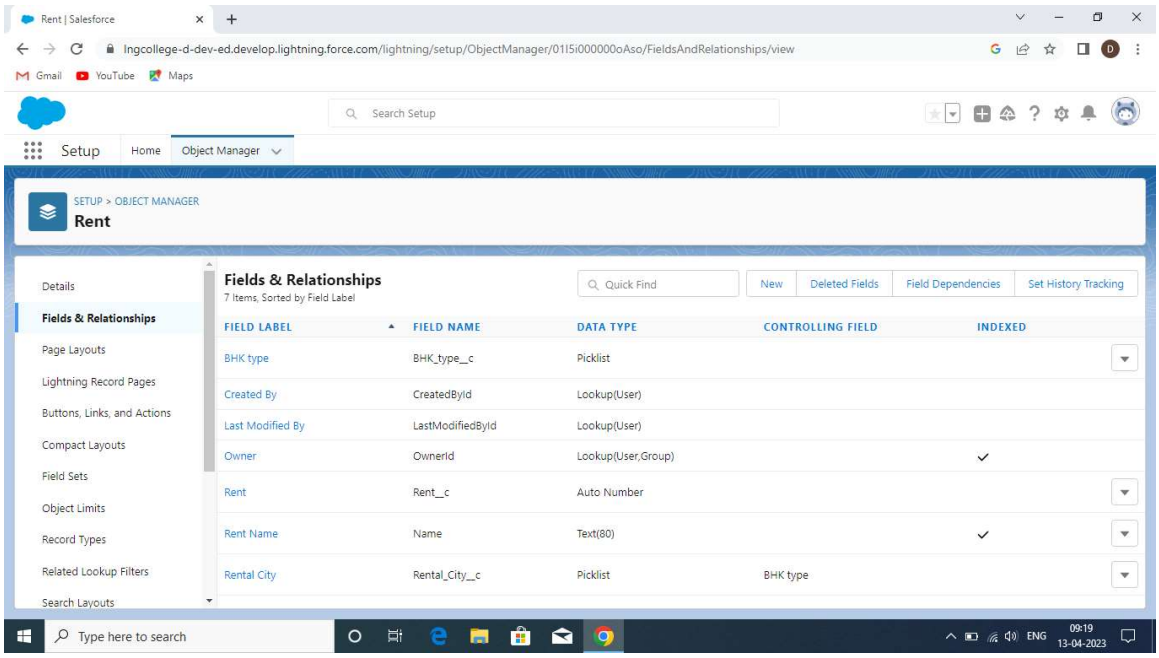
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YouTube
Maps
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Page Layouts
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Record Types
Related Lookup Filters
Search Layouts
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Quick Find
New
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Field Dependencies
Set History Tracking
FIELD LABEL
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CONTROLLING FIELD
INDEXED
BHK type
BHK_type__c
Picklist
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
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Rent__c
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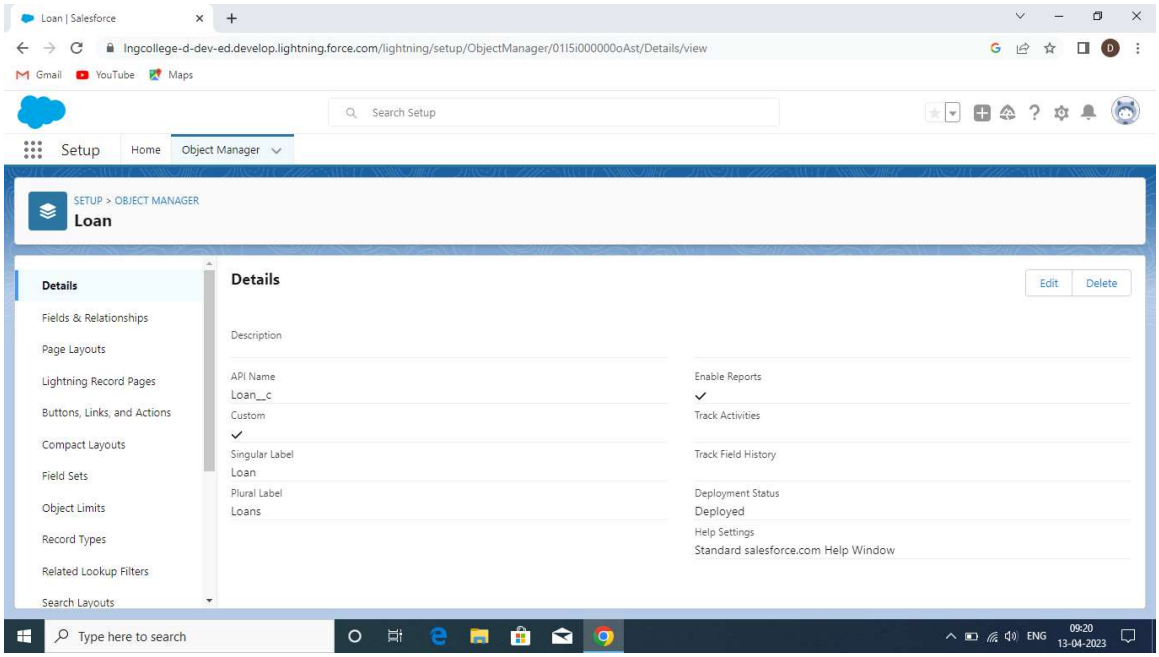
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Track Activities
Track Field History
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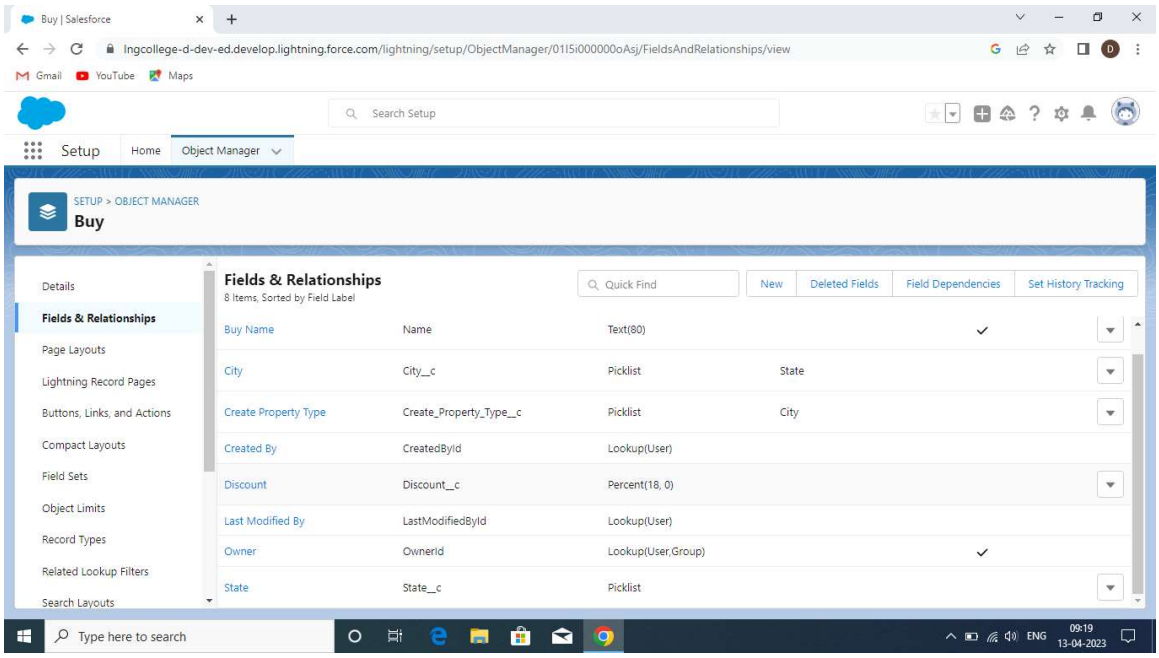
Buy | Salesforce
Search Setup
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Object Manager
SETUP > OBJECT MANAGER
Buy
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Page Layouts
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Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Fields & Relationships
8 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
Buy Name | Name | Text(80)
City | City__c | Picklist | State
Create Property Type | Create_Property_Type__c | Picklist | City
Created By | CreatedById | Lookup(User)
Discount | Discount__c | Percent(18, 0)
Last Modified By | LastModifiedById | Lookup(User)
Owner | OwnerId | Lookup(User,Group)
State | State__c | Picklist
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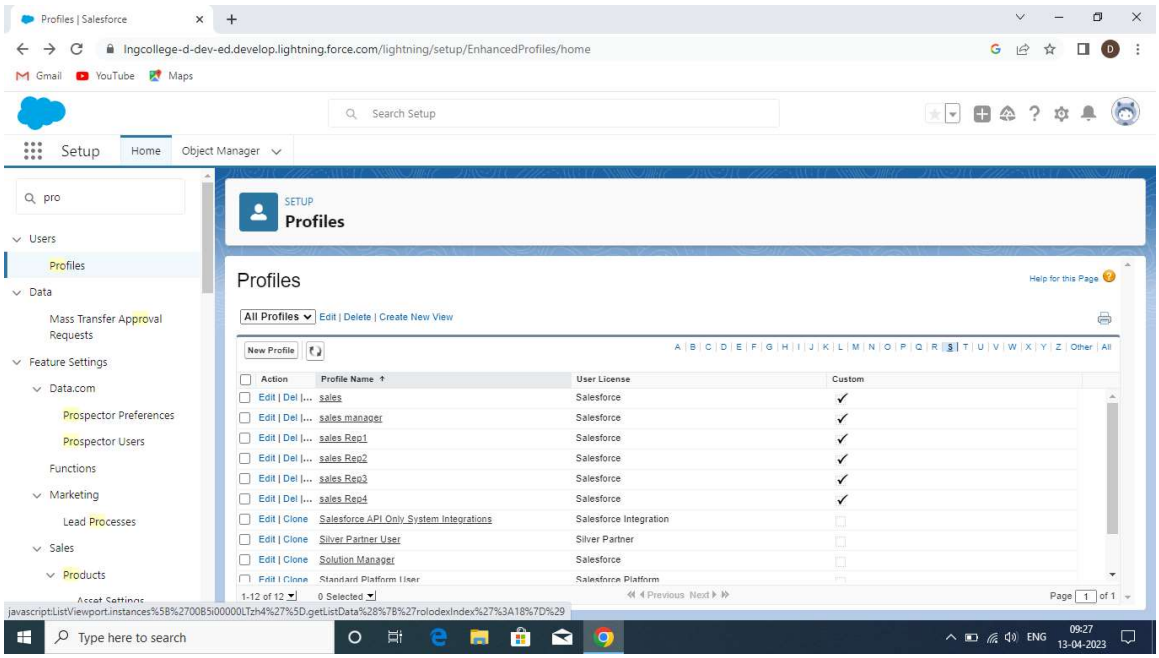
- Profile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Search Setup
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Object Manager
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Users
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Data
Mass Transfer Approval Requests
Feature Settings
Data.com
Prospector Preferences
Prospector Users
Functions
Marketing
Lead Processes
Sales
Products
SETUP
Profiles
Profiles
Help for this Page
All Profiles
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New Profile
Action
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User License
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Edit | Del | ... sales manager | Salesforce
Edit | Del | ... sales Rep1 | Salesforce
Edit | Del | ... sales Rep2 | Salesforce
Edit | Del | ... sales Rep3 | Salesforce
Edit | Del | ... sales Rep4 | Salesforce
Edit | Clone Salesforce API Only System Integrations | Salesforce Integration
Edit | Clone Silver Partner User | Silver Partner
Edit | Clone Solution Manager | Salesforce
Edit | Clone Standard Platform User | Salesforce Platform
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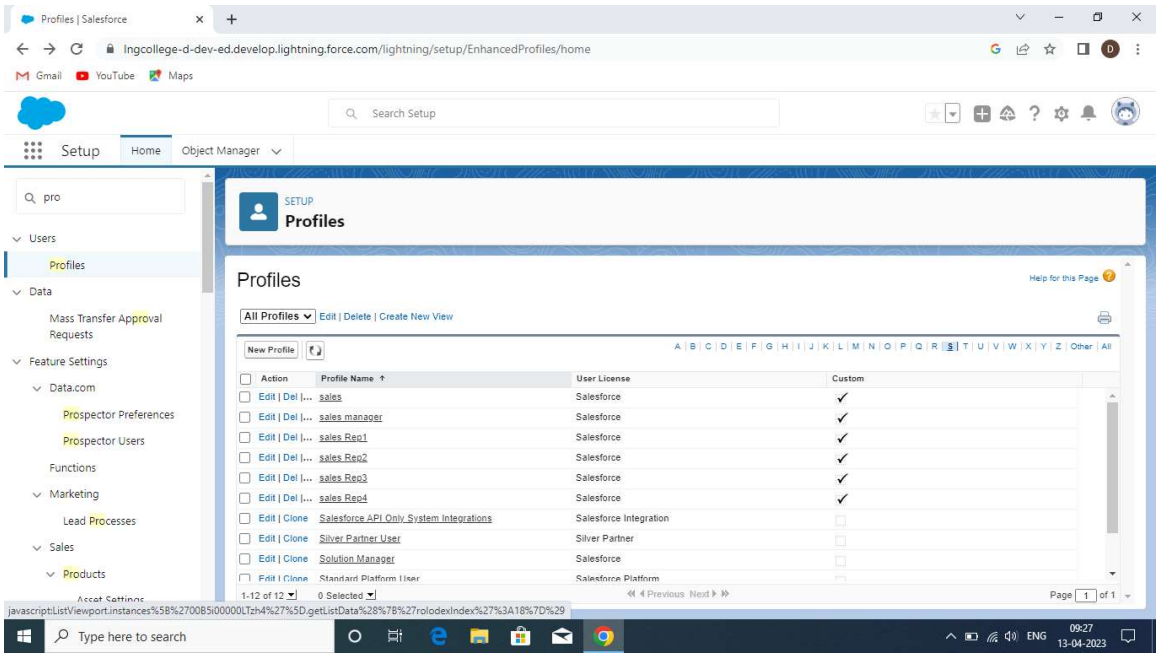
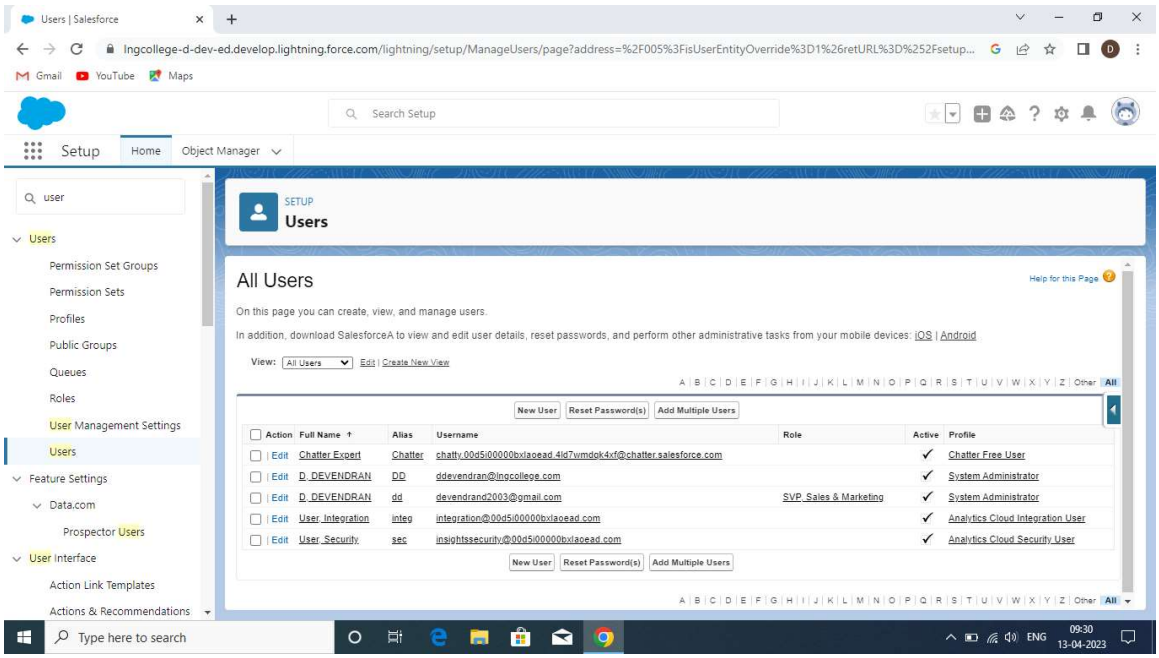
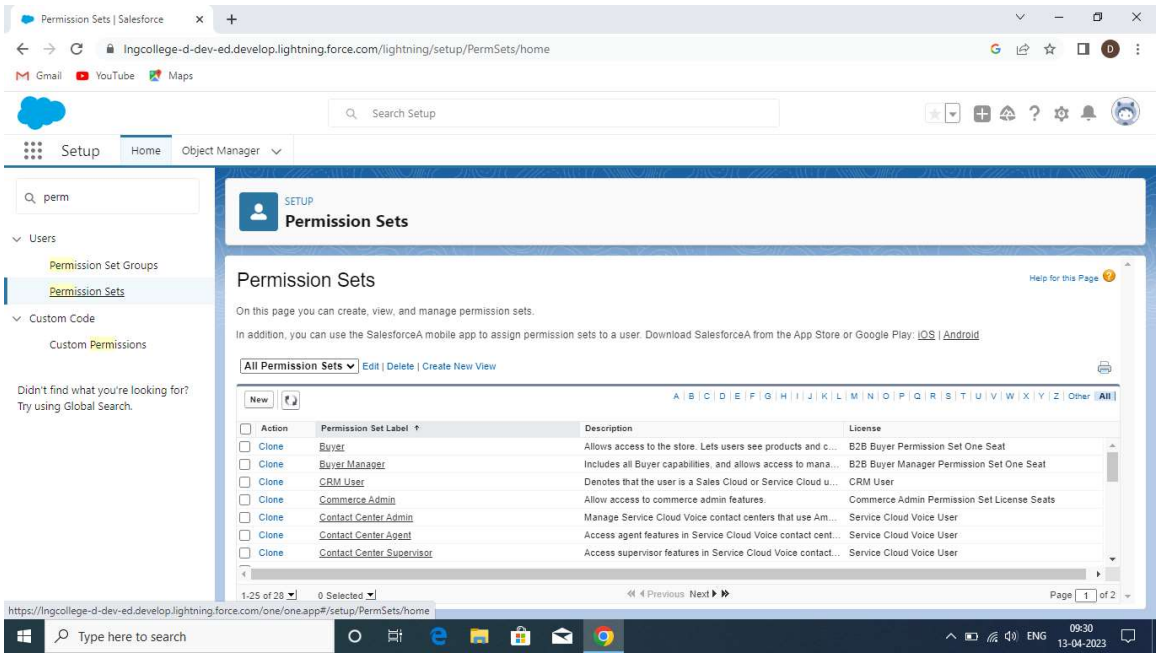


- New Users



- Permission Sets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Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
perm
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Permission Sets
Help for this Page
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
All Permission Sets
Edit | Delete | Create New View
New
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Permission Set Label
Description
License
Clone
Buyer
Allows access to the store. Lets users see products and c...
B2B Buyer Permission Set One Seat
Clone
Buyer Manager
Includes all Buyer capabilities, and allows access to mana...
B2B Buyer Manager Permission Set One Seat
Clone
CRM User
Denotes that the user is a Sales Cloud or Service Cloud u...
CRM User
Clone
Commerce Admin
Allow access to commerce admin features.
Commerce Admin Permission Set License Seats
Clone
Contact Center Admin
Manage Service Cloud Voice contact centers that use Am...
Service Cloud Voice User
Clone
Contact Center Agent
Access agent features in Service Cloud Voice contact cent...
Service Cloud Voice User
Clone
Contact Center Supervisor
Access supervisor features in Service Cloud Voice contact...
Service Cloud Voice User
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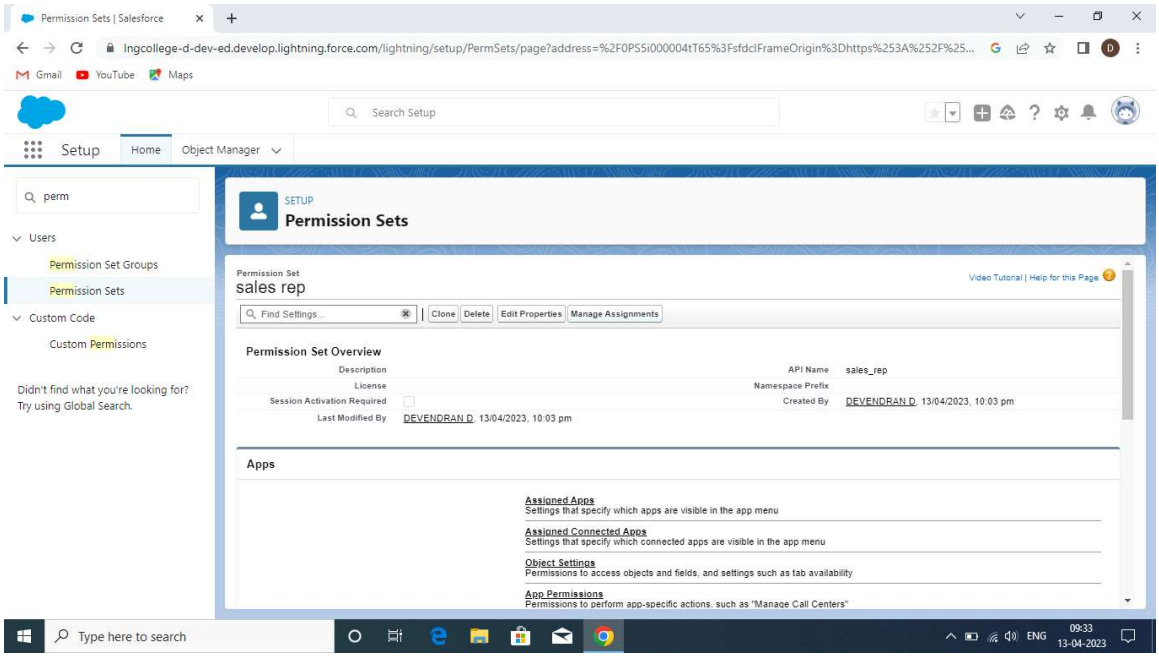
Permission Sets | Salesforce
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Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
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Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Permission Set
sales rep
Video Tutorial | Help for this Page
Find Settings...
Clone
Delete
Edit Properties
Manage Assignments
Permission Set Overview
Description
License
Session Activation Required
Last Modified By
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API Name
sales_rep
Namespace Prefix
Created By
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Apps
Assigned Apps
Settings that specify which apps are visible in the app menu
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu
Object Settings
Permissions to access objects and fields, and settings such as tab availability
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"
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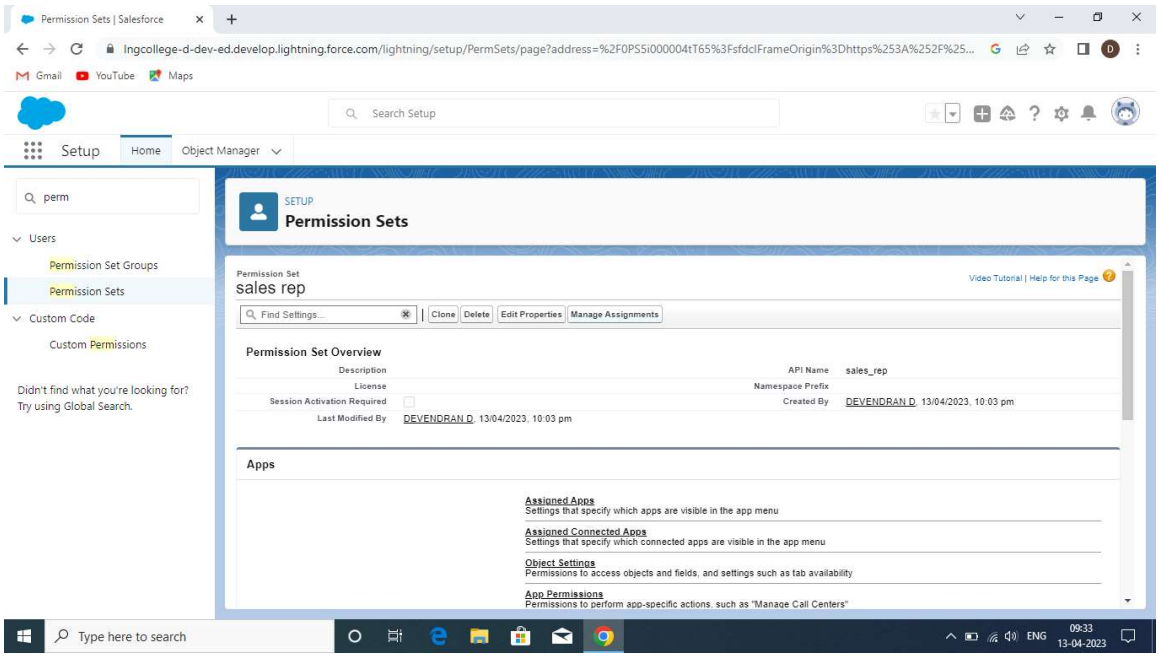

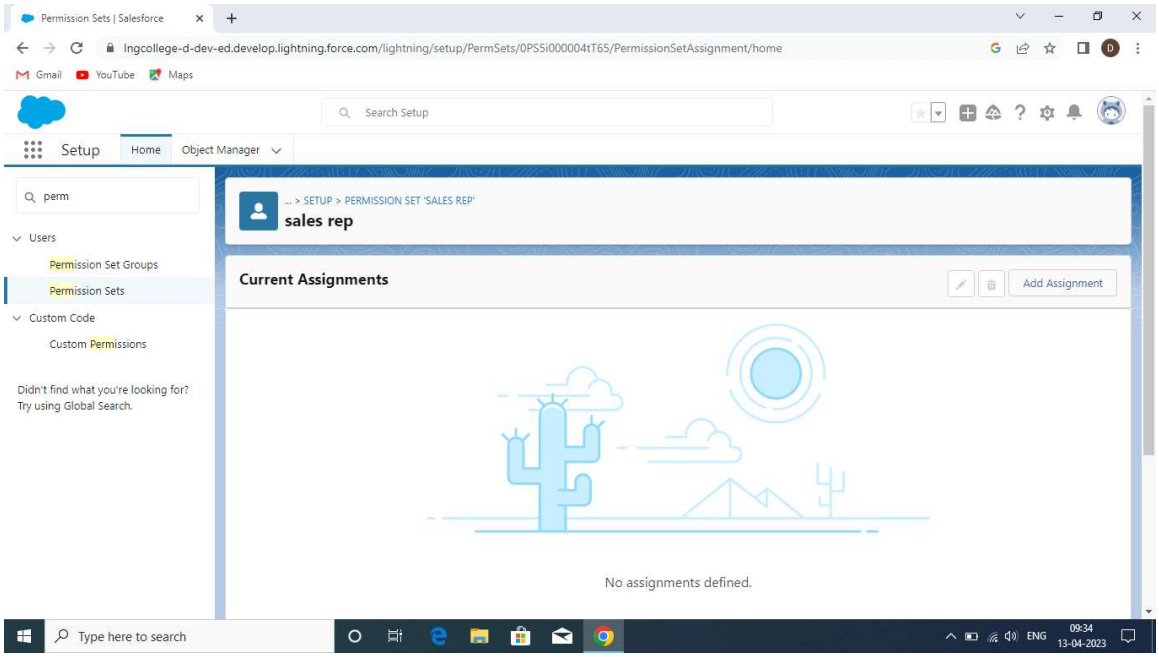

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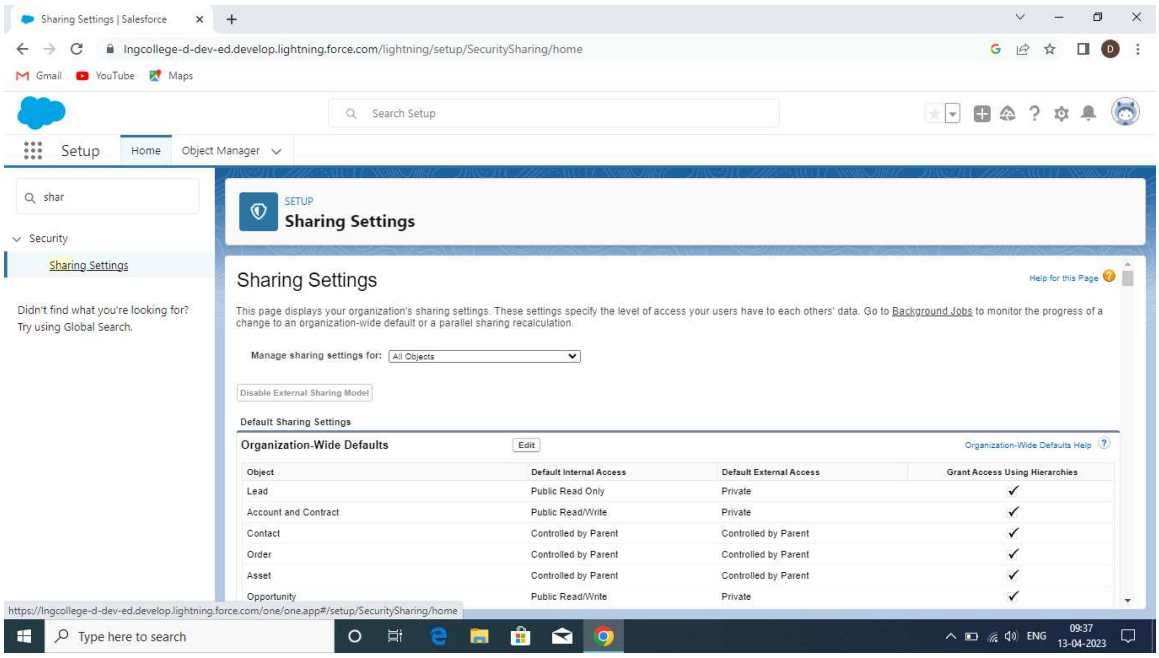

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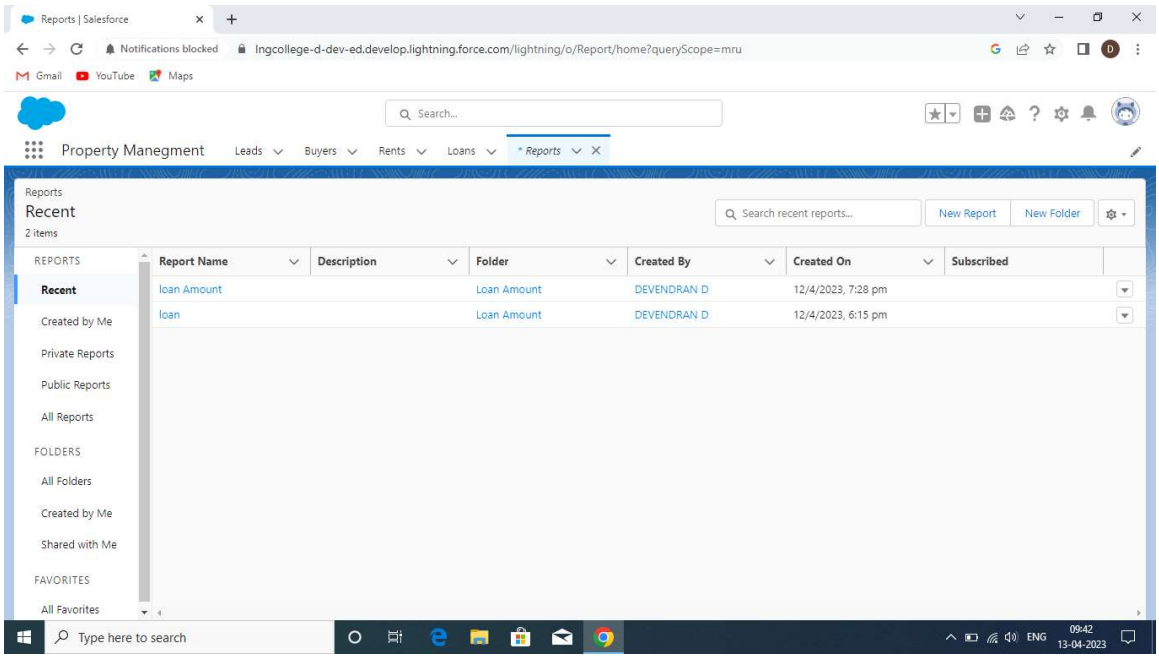
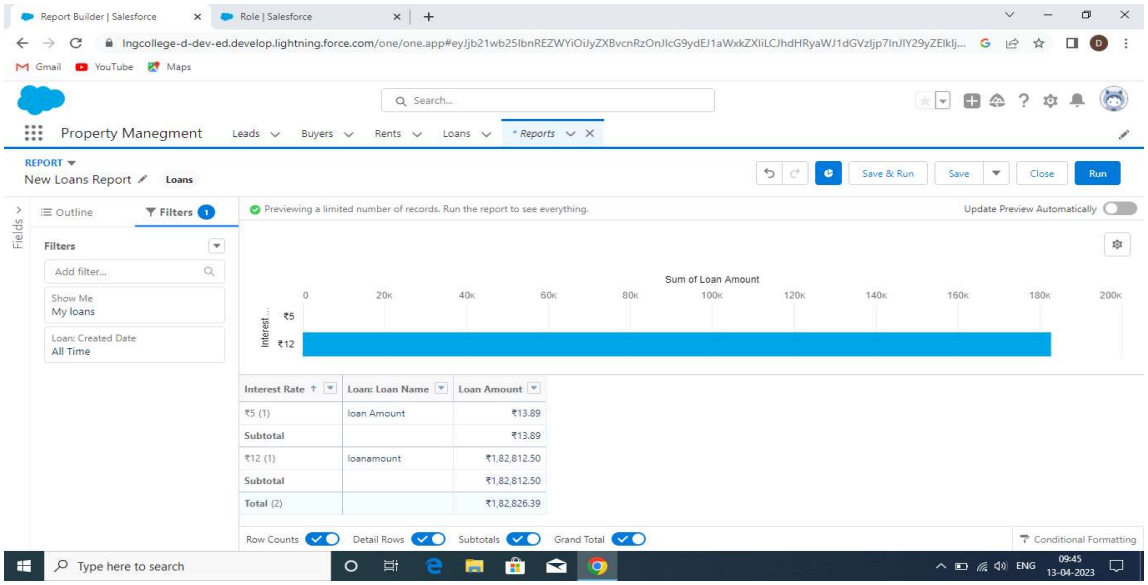
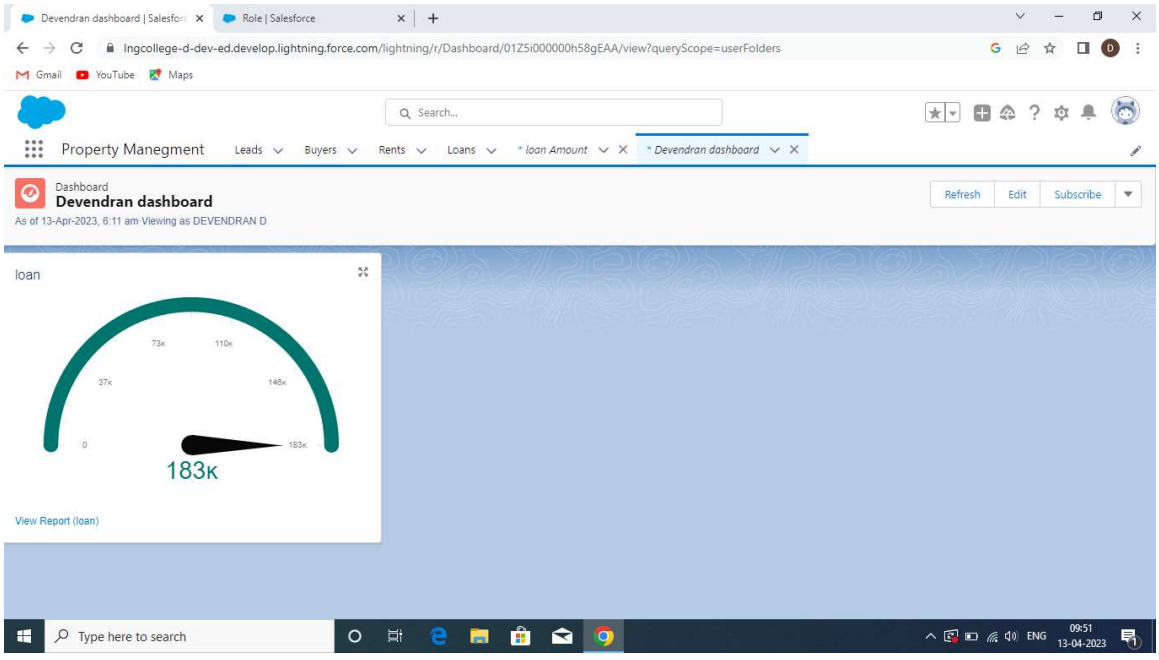


Dashboards

First go to App launchar and select the dashboards and click on

new dashboards and add the name,select folder anad select repoet and Add componet and save and done





We have completed this project through this points

4.Trailhead profile public URL

Team lead-https://trailblazer.me/id/ababi100

Team member1-https://trailblazer.me/id/bbanumathi1

Team member2-https://trailblazer.me/id/dtamilmediumshift-1

Team member3-https://trailblazer.me/id/ddhana43

5 ADVANTAGES & DISADVANTAGEES

Advantages	Disadvantages
Assist owners in creating budgets	time-consuming if you choose the wrong system
Advertis rental properties	Might seem expensive for as small businss
Qualify tenants & collect rents	training(cost and time)

6 APPLICATION

A property managment application (PMS) is a software application for the operations of hospitality accommdation and commerical residential rental properties.proprty managment application is also usd in manufacturing industries ,local government and manufacturing.

7 CONCLUSION

conclusion summarizing the entire work and findings

In conclusion,property managment system

(PMS) software is very crucial for all the hotals.Especially opera PMS constitutes the most appropriate PMS software for Hilton Athens.it is user friends,connects with central Reservation system (CRS), point of sale (POS) etc. and provides all the tools the hostal needs in order to operate effectively.

8 FUTURE SCOPE

Enhancements thats can be made in the future

property management companies have been positioned for growth,taking advantage of digital trends in order to reach a lager customer base. this includes leveraging technologe to streamingne communication between landlords and tenant,as well as utillzing virtual tools to provide more etticient customer service .with property management companies now having accss to new digital tools,the process for property for rent become more streamlind and efficient.

DEVENDRAN.D

2023

PROPERTY MANAGEMENT APPLICATION USING SALESFORCE

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THANK YOU